

Sage CRM v6.20 - What's New At a Glance

Introducing Sage CRM v6.20

Sage CRM is an easy-to-use, web-based CRM solution which can be quickly deployed on-premise or on-demand for rapid ROI. Award-winning Sage CRM is feature-rich and delivers a broad range of functionality to small and mid-sized businesses worldwide. It offers deep integration to leading Sage ERP systems, connecting the front and back office, automating key business processes, and providing total visibility and control right across the organisation.

Sage CRM v6.20 launches in November 2008. This standalone application of Sage CRM v6.2 introduces a number of new features including:

- Themes
- Relationship Manager
- New Email Editor Toolbar
- Microsoft Outlook Integration Enhancements

And much, much more. The table below details all new features and enhancements which will be included in this latest release.

Feature	Explanation	Benefits
Sage CRM enhancements/new features:		
Themes	The branding toolkit within v6.20 provides the ability to change the look and feel of Sage CRM. [Fig. 1]	This exciting feature provides the tools to customise Sage CRM colours and fonts to a corporate image or brand.
Relationship Manager	Relationship Manager governs the relationships between primary entities within Sage CRM. Relationship Manager enables any primary entity to be linked to another primary entity, and allows the user to provide a description for the relationship. [Fig. 2]	Provides the ability to describe and visualize valuable relationships with customers leading to more productive use of CRM data resource.
New Email Editor Toolbar	The e-mail editor is a functionally rich toolbar which facilitates the creation and editing of emails within Sage CRM including: Spell Checker, What You See is What You Get (WYSIWYG) editing. [Fig. 3]	Allows you to create exciting emails to send to your customers that look great.
Component Manager Enhancements	This feature has been enhanced to allow the exportation of customisations from one Sage CRM system to another Sage CRM system. This includes: visual component name reminder; add items by date or user to a component; component manager installation log and overwrite items option on installation.	These enhancements are particularly beneficial to Business Partners who frequently customize Sage CRM. The improvements within component manager save essential time during customisations as business partners can create, install and troubleshoot components quickly and easily.
Address Linking	The ability to easily link an address to both a person and a company.	Quickly and easily manage key CRM data, hence avoiding data duplication and saving essential time.
Solo Filtering Profiles Enhancements	The ability to define a profile that creates the rules for the contents of the offline dataset for a Solo user and assign it to them.	Allows you to efficiently manage your Solo user's data that can be taken offline from the server.
Microsoft Outlook Integration Enhancements	This release introduces further improvements to Sage CRM's integration with Microsoft Outlook including: re-written using the latest APIs; recurring appointments improvements.	The enhancements allow tighter Sage CRM and Microsoft Outlook integration resulting in a more seamless user experience.
Microsoft Windows 2008 Server Support	The ability to install Sage CRM web portal on IIS7 and Microsoft Windows 2008 Server.	Greater choice of deployment options for the web server portal.
Microsoft Vista support for SOLO clients	The ability to install Sage CRM SOLO web portal on IIS7 and Microsoft Vista.	Greater choice of deployment options for the SOLO client.

Note: The above features and benefits are described in reference to the standalone release of Sage CRM v6.2. Integrated versions of the software will vary in release schedule and possibly in features offered.

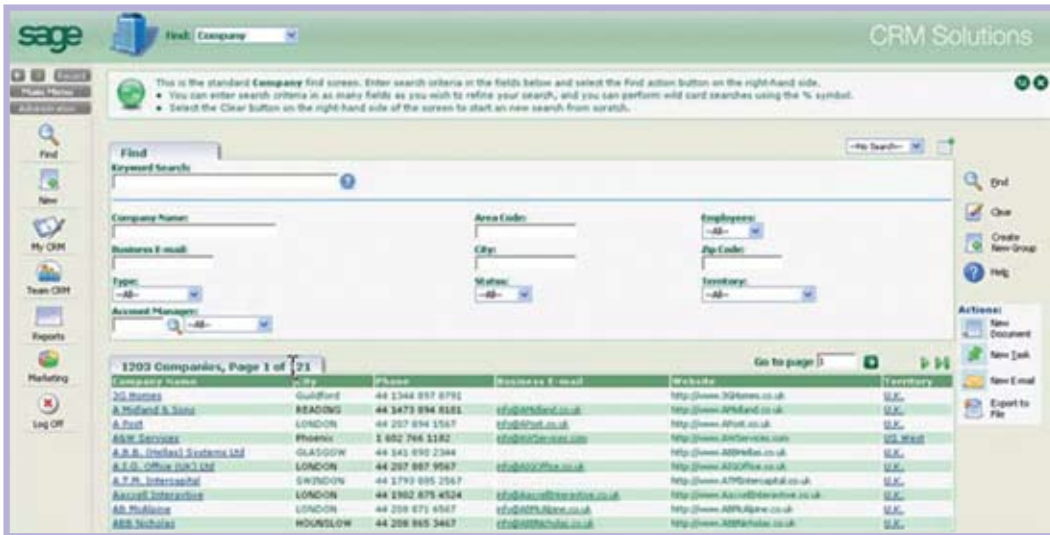


Fig. 1 – Example theme with Sage CRM

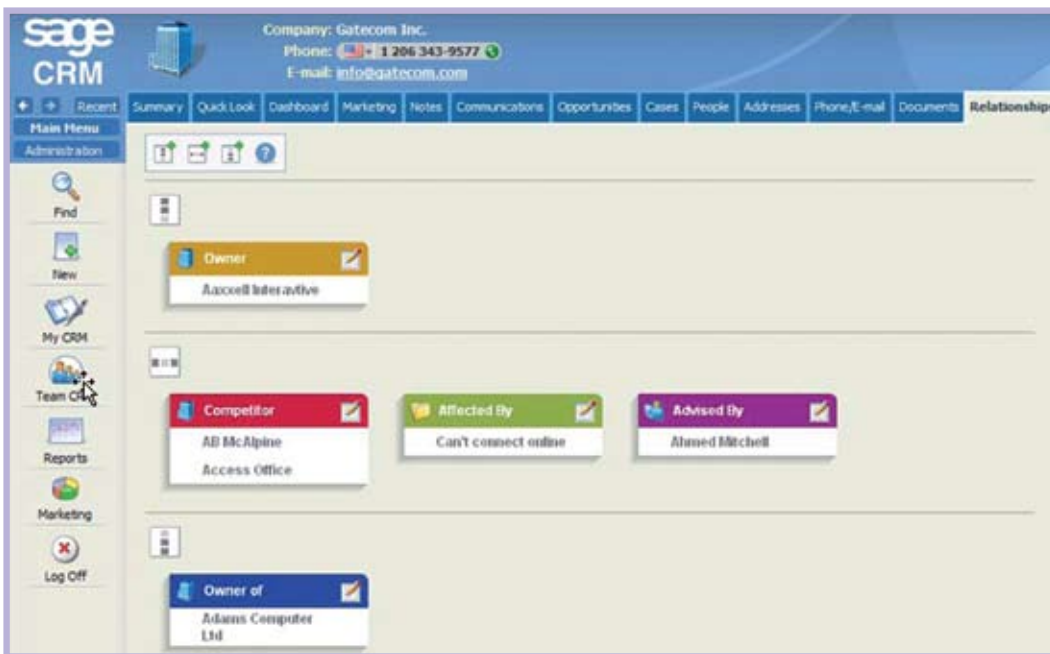
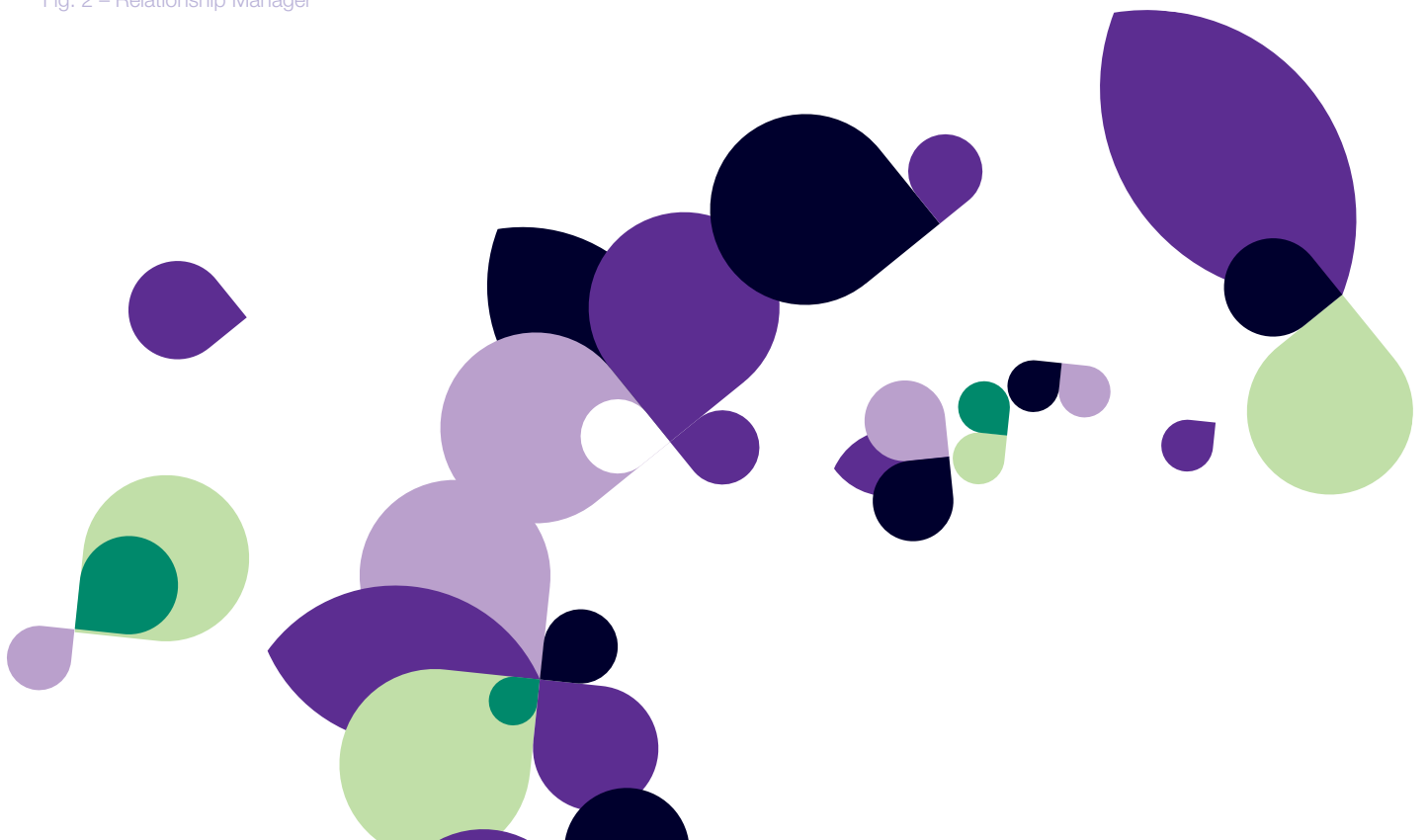


Fig. 2 – Relationship Manager



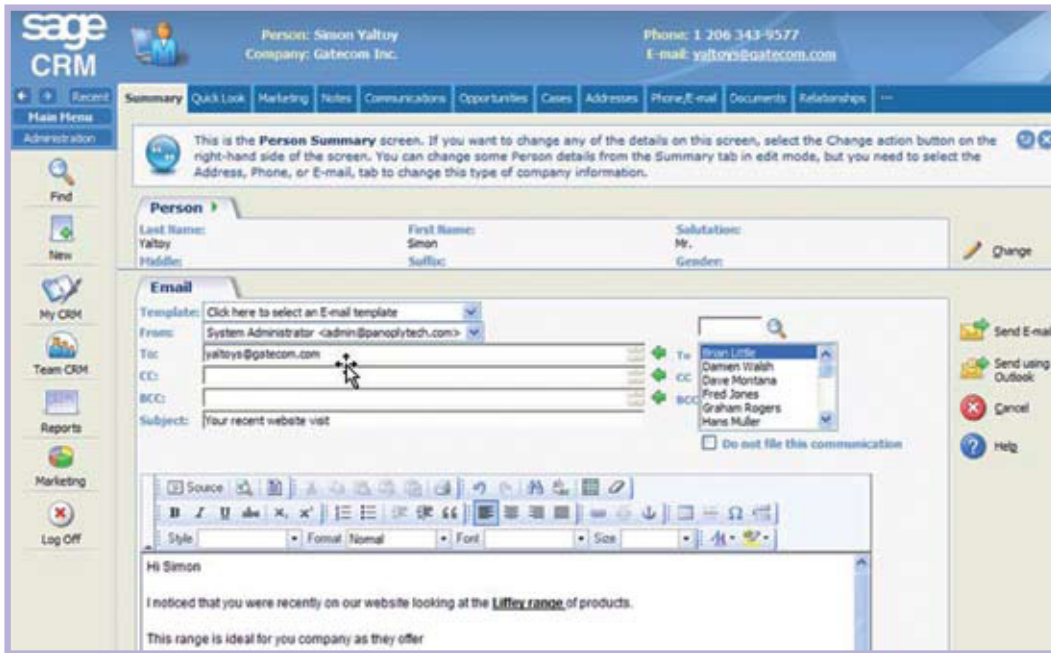


Fig. 3 – Email Editor Toolbar

PINNACLE

Computing Solutions

Talk to us!
 t: UK: 0845 120 0064 / ROI: 01 419 8990
 e: pinnacledirect@pinnacle-online.com
 w: www.pinnacle-online.com

